

FOM Funding Instructions for PI's and Financial Assistants

As a financial assistant, you will be copied on the test emails for your PI, so will be notified of the charges posted on the funding for the prior month before the internal billing is done. Please respond by the due date if you want the funding updated.

1. If you would like to move charges to new funding, please go into the PI's account to make sure the funding is listed and is active. If not listed, you will have to enter that funding, notify the user to add the funding to their account. I will not be able to move charges until this is complete.
2. To add new funding, **select supervisor home**, select the appropriate PI if you are a financial assistant for multiple PI's, then go to group financial accounts.

- a. Account number is what pulls into the billing for WisDM so make sure all information is correct: department is without the A, and the project has to be the full project number not just the numbers. (ex, AAC1234, 233AE12, PRJ25AC)
 - b. Research description name is anything that you want to describe this project, name of project or put in funding # again.
 - c. Enter the expiration date of the funding. Once the date hits, the user will not have access to that funding.
3. You can also set individual expiration dates on the user's account. Once the end dates occurs, that user will not have access to the lab with that funding anymore. If the user does not have any other funding on their account, they will not have access to the lab.

FYI, users listed in blue have that PI as their supervisor; users listed in red have another supervisor listed on their account.

Account Number	User Name	Research description name	Account Number Status	Is Default	Expiration Date	Expense Limit	Expense So Far
190300-233-4-AAB9973	Kaila Bertsch	233AAB9973-4 190300	Active	<input checked="" type="checkbox"/>	02/22/2020	0.00	14314.40
	Janine Erickson	233AAB9973-4 190300	Active	<input checked="" type="checkbox"/>	02/22/2020	0.00	14314.40
	Gabriel Marc de Bellefon	190300-233-4-AAB9973	Active	<input checked="" type="checkbox"/>	01/01/2109	0.00	14314.40
	Michael Nezpoda	233AAB9973-4 190300	Active	<input checked="" type="checkbox"/>	02/22/2020	0.00	14314.40
	Dan Thoma	190300-233-4-AAB9973	Active	<input type="checkbox"/>	01/01/2109	0.00	14314.40

4. You can go in and inactivate a project when you want it to end for billing purposes.
 - a. Inactivating in on the top screen will prevent someone from being able to pick that funding once it has been inactivated.
 - b. Clicking on the bottom on the user will inactivate that funding on their user account from the date that you inactivate it.
 - c. You can notify me then to move any charges in that current month to the new funding before the test emails come out.